

National Workforce Projects
part of Skills for Health

The background of the cover features three dark silhouettes of healthcare professionals standing with their hands on their hips. On the left is a man in a white lab coat, in the center is a woman in a white lab coat, and on the right is a man in a white lab coat. They are positioned against a solid red background.

Workforce Supply Assessment Tool *user guide*

About this guide

The NWP Supply Assessment Tool User Guide is organised as follows:

Chapter 1 Introduction, provides detailed start-up information and a brief description of the major components of the tool.

Chapter 2 Assessing Workforce Supply Tool, contains a description of the over all functionality of the tool, features provided, description of sheets intended for acquiring the data from users, and description of the sheets involved with report generation.

Who is it useful for?

The tool is intended for any member of staff who would benefit from assessing elements of their workforce supply to enable and facilitate effective workforce planning at a fully scalable level.

How can it help me and my organisation?

Whether you're looking for individual statistics, such as sickness and absence or attempting to display a more holistic report, this tool illustrates the process for you. It's designed to profile the current staff at a trust/PCT and help the organisation illustrate their workforce supply issues and aid workforce planning.

Documentation conventions

The Workforce Supply Assessment Tool User Guide uses the following conventions:

Symbol	Usage
Click	Refers to positioning the mouse pointer (or cursor) over a page button image or a link, and clicking the left mouse button. If pressing the right mouse button is required, this is stated as right-click.
Enter	Refers to typing letters or numbers on the computer keyboard.
	Note: Calls your attention to additional information.
	Tip: Calls your attention to a useful tip.
	Warning: Calls your attention to an important warning.
Bold type	Field names and images names within an explanation.

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Introduction

NWP supply assessment tool overview

It is an Excel based tool designed to generate the workforce supply oriented reports automatically, based on the data entered. These reports can be used for analysis and workforce planning for the future. This tool can be used to assess the current workforce supply statistics and forecast its future implication to an organisation.

The purpose of the tool is to support step 4 of NWP's 6-step guide to workforce planning by providing an accurate starting point for workforce improvement/workforce plans.

Moreover this tool will be used for decision making purposes by the managers of an organisation.

This tool has two main components: input section and output section. The detailed information can be seen in respective chapters; however, a brief introduction of these is as follows:

Input section of tool

This section deals with acquiring the data from users (ESR administrator in this case). It comprises of two excel sheets:

i) Employee sheet ii) Department target FTE sheet. The 'Employee Sheet' contains data about all employees; whereas the 'Department Target FTP Sheet' will contain data about estimated targets for employees grouped on basis of either OCC Code, department, directorate, or trust. Details of both sheets can be seen in *Chapter 2 Assessing Workforce Supply Tool* of this document.



Keep saving your work while entering data, to prevent any data loss. Click  in upper left corner of main window to save the work.

Output section of tool

This section of the tool deals mostly with report generation. All the data entered in 'input section' will be used in generating reports in this section.

This section comprises of two parts:

- Report Generation

The report generation part comprises generation of 11 different reports, details of which can be seen in *Chapter 2 Assessing Workforce Supply Tool*.

- Exporting Data to SRT

The data export part deals with exporting the data to an existing empty SRT tool workbook. 'How this can be achieved?' is discussed in detail in *Chapter 2 Assessing Workforce Supply Tool*.

Process flow for NWP workforce supply assessment tool

The process flow diagram for NWP Workforce Supply Assessment Tool is as follows:

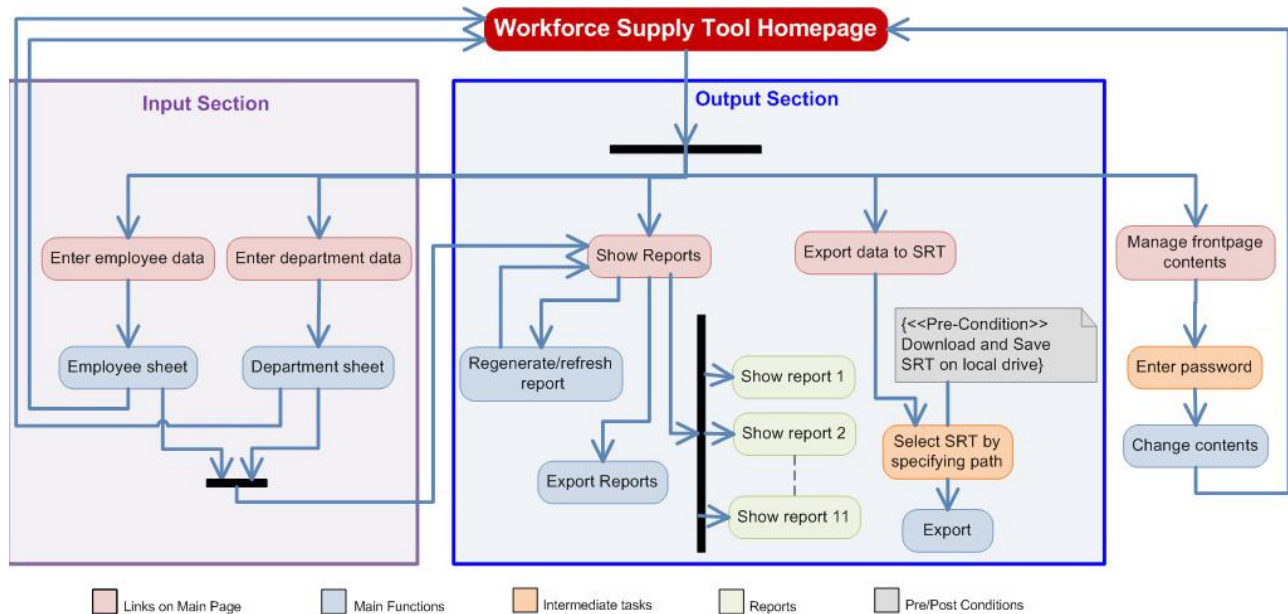


Fig A: Workforce Supply Assessment Tool-Process Flow Diagram

Assessing Workforce Supply Tool

You will learn...

- Getting Started
- Input Sheets
- Generating outputs (reports and exporting data)
- Using Excel Sheets
- Managing Front Page Contents

This chapter provides detailed information about Workforce Supply Tool, using the sheets for entering data and generating outputs in the form of reports or exporting to other external files/tool, and customising the main interface of tool.

Getting started

Workforce Supply Tool is an Excel based tool. You must download it to the system, from Healthcare Workforce Portal (www.healthcareworkforce.nhs.uk), to use it within your organisation.



The tool will work only with Microsoft Excel 2003.

The NWP Supply Assessment Tool needs to be configured for macros before launching it successfully. For using this tool, the macro security level should be set to low. To do the task, perform these steps:

1. Go to 'Tools' menu in task bar.
2. Select 'Macro' from this menu.
3. Select 'Security' from sub-menu.

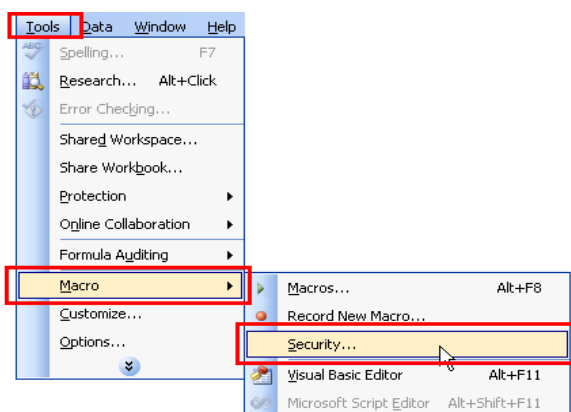


Fig B: Macro Settings-Menu

4. A pop-up will open. In this pop-up, under **Security Level Tab**, select **low** option by clicking on the respective radio button. (See figure C).

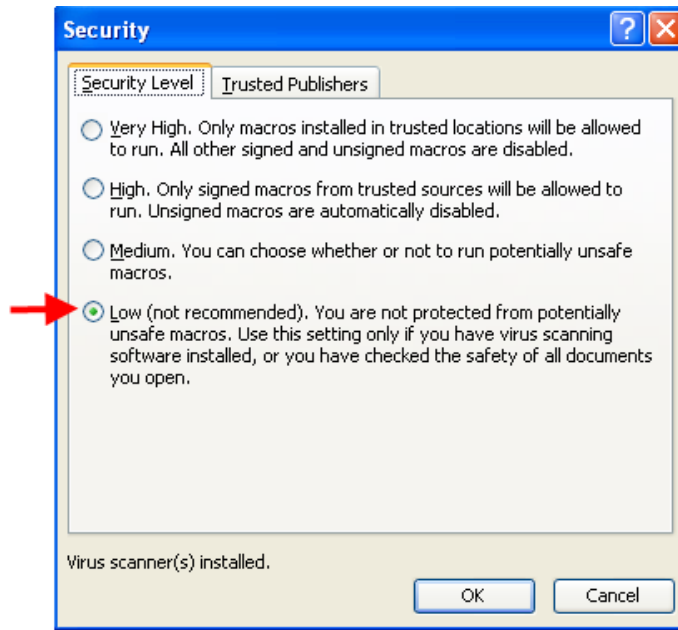
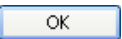


Fig C: Macro Security Level Settings

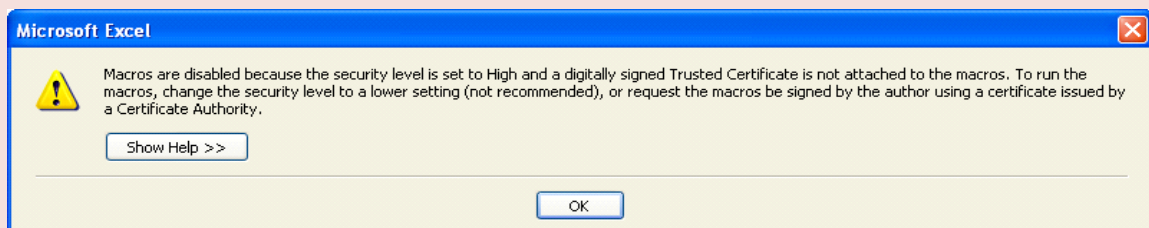
5. Click .
- The settings will be saved.
6. Close the tool and reopen it, for using.



You will have to configure these settings only while launching application for first time.

7.

If user tries to exit design mode before reopening the file he/she will get the following message:



Logging in

1. Launch Workforce Supply Assessment Tool.

Following page displays.

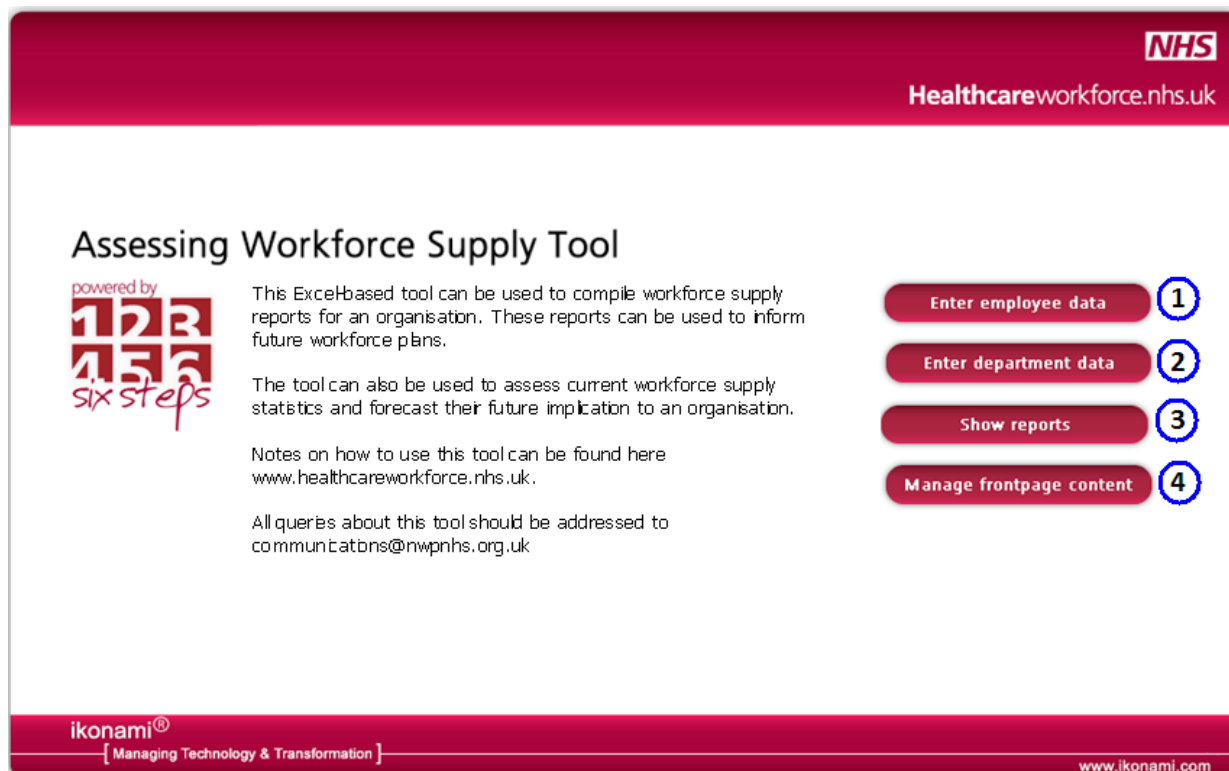


Fig 2.1 Workforce Supply Assessment Tool-Main Page

» ENTER EMPLOYEE DATA

Click to open an Excel sheet where you can enter Employee data.

» ENTER DEPARTMENT DATA

Click to open an Excel sheet where you can enter Department data.



The above mentioned areas comprise 'input' section of the tool; where you can enter the required data. It is explained in detail in section "Using Input Sheets".

» SHOW REPORTS

Click to open a new screen from where you can view all reports.



Show Reports area comprise 'output' section of the tool; where you can get the reports based on data entered in 'input' section. It is explained in detail in section "Using Output Sheets".

» MANAGE FRONTPAGE CONTENTS

Clicking this will let you change the contents of main page, as desired.



For more details, refer to "Managing Front Page Contents" section in this chapter.

Input sheets

As mentioned above, the input section comprises of two sheets where data can be entered. Each of the sheets is discussed below.



Keep saving your work while entering data, to prevent any data loss. Click  in upper left corner of main window to save the work.



All the following fields should be filled appropriately with meaningful data for effective reporting as the reports are mainly based on these fields:

User ID, OCC Code, OCC Description, Age, Pay Band, Pay Point, Directorate, Department, Team, Contract Type, Termination Date, Trust Employer, Number of days absent, Number of days sick, Destination on leaving, Source on Recruiting, Assignment work usage, KSF Dimension, Achieved Level, Gender, Target Absence.

Using 'Employee data sheet'

By using this sheet, you can enter the employee data in respective fields. Here, each row represents the data about a single individual. But if a person is associated with multiple Competencies (ie Dimensions) then the whole record will be repeated again for each competency (or dimension).

1. Click **Enter employee data** from figure 2.1 (numbered as 1).

Following page displays.

Assessing Workforce Supply Tool										
Employee sheet										
<< Back to home page										
User ID	OCC Code	Age	Ethnicity	Area of Work	Pay Band	Pay Point	Directorate	Department	Team	
1 AF001		22	White			2	Cardiac	Surgery	Clinical	
2 HR003		44	White			8a	Human Resources	Occupational Health	HR	
3 QA004		40	Swiss Ethnicities			9	Clinical Governance	Clinical Governance	Clinical	
4 HR002		39	Mixed			7	Finance	Bank	Financial	
5 QA004		25	Mixed			5	20 Facilities	Education & Development	HR	
7 AF001		31	Mixed			1	4 Cardiac	Surgery	Clinical	
7 AF001		31	Mixed			1	4 Cardiac	Surgery	Clinical	
7 AF001		31	Asian or Asian British			4	15 Cardiac	Surgery	Clinical	
5 QA004		25	Mixed			5	20 Facilities	Education & Development	HR	

Continued...

Figure 2.2 Employee Sheet

Following table shows the details of columns used in the **Employee Data Sheet**.



For fields marked with *, the following instruction applies:

Click  in front of required field, and select a value from given drop down list.

Column Name	Column Description
User ID	Represents the user ID of employee.  It should be unique for every Job of an employee. Same User ID will need to be repeated for every Competency/ Dimension with which employee is associated for a particular job.
OCC Code *	Represents National Occupational Code values that are currently provided by the ESR system. Values can also be entered manually.
Age	Represents the age of employee.  Click number hyperlink (marked as red) in fig 2.5 to drill down and see details of awaiting post outlines.
Ethnicity *	Represents the ethnicity group of the employee. These values are also provided by ESR. Values can also be entered manually.
Area Of Work	Represents the working area of employee.  You can enter alpha numeric data in this field, manually.
Pay Band *	Represents the salary band of employee.
Pay Point *	Represents the pay-point of employee. Values can also be entered manually.  The drop-down will be available only if the Pay Band is selected first.
Directorate	Represents the directorate to which the employee belongs.  You can enter any required text data in this field, manually.
Department	Represents the department to which the employee belongs.  You can enter any required text data in this field, manually.
Team	Represents the team to which the employee belongs.  You can enter any required text data in this field, manually.

Staff Group	Represents the staff group to which the employee belongs.  You can enter any required text data in this field, manually.
Contract Type *	Represents the contract type of employee. Manual entry is not allowed here.
Job Title *	Represents the job title of employee.  You can enter any required text data in this field, manually.
Gender *	Represents the gender of employee. Manual entry is not allowed here.
Disability Indicator *	Represents either employee has some disability or not.
Disability Indicator Description *	Represents the details of disability in an employee.  You can enter any required text data in this field, manually.
Date Of Hiring	Represents the hiring date of employee.  You can enter any required text data in this field, manually. The format should be dd/mm/yyyy.
Date Of Termination	Represents the termination date of employee.  You can enter any required text data in this field, manually. The format should be dd/mm/yyyy.
Trust Employer *	Represents the employer-trust's name of employee. The values can be selected from pre-populated lists of trusts. Manual entry is not allowed.
Number Of Days Absent	Displays total number of days of employee's absence.  You can enter any required text data in this field, manually.
Number Of Days Off Sick	Displays total number of days of employee's absence on grounds of 'sick leave'.  You can enter any required text data in this field, manually.
Destination On Leaving *	Represents the name of the trust where employee has moved after switching the job.
Source on Recruiting	Represents the organisation name that the employee joined in initially under NHS.
Assignment Title	Represents the Assignment title of employee. In case employees have multiple assignments, you can enter another row for the same employee but with different assignment title.  You can enter any required text data in this field, manually.

Assignment Work Usage	Represents a numeric FTE value.  You can enter any required text data in this field, manually.
KSF Dimension *	Represents the core and specific KSF dimensions for employee. You can add another row(s), in case a person has more than one dimension for a particular assignment. Manual entry is not allowed.
KSF Dimension-Level *	Represents the level of employee against each core/specific KSF dimension. Manual entry is not allowed.
Overtime	Represents the extra number of hours that the employee has put in.  You can enter any required text data in this field, manually.

Using 'Department target FTE sheet'

At this sheet, the user can enter the data in respective fields, about estimated targets for employees grouped on basis of OCC Code, department, directorate, and trust. Here, each row represents the data for a Trusts' hierarchal group.

1. Click **Enter department data** from figure 2.1 (numbered as 2).

Following page displays.

Assessing Workforce Supply Tool

Department sheet

<< Back to home page

NHS

Healthcareworkforce.nhs.uk

Trust Name	Directorate Name	Department Name	Team Name	OCC Code	Target Attendance	Target Absence
Bedfordshire HA	Facilities	Education & Development	HR	QA004	78.00	25.00
Cambridgeshire	Finance	Bank	Financial	HR002	500.00	45.00
Great Yarmouth	Human Resources	Occupational Health	HR	HR003	151.00	100.00
Lifespan Healthcare	Cardiac	Surgery	Clinical	AF001	12.00	15.00
North West Anglia	Clinical Governance	Clinical Governance	Clinical	AF002	10.00	23.00
Lifespan Healthcare	Clinical Governance	Surgery	Clinical	ER005	2.00	10.00

Figure 2.3 Department Sheet

Following table shows the details of columns used in the **Department Sheet**.

Column Name	Column Description
Trust Name *	Represents the name of trust. Values can also be entered manually.
Directorate Name	Represents the subject directorate within each trust.  You can enter any required text data in this field, manually.
Department Name	Represents the department name within each directorate.  You can enter any required text data in this field, manually.
Team Name	Represents the team name with each department.  You can enter any required text data in this field, manually. This is an optional field.
National Occupational Code *	Represents the group of employees on basis of National Occupational Code of employees, within a team or department. Values can also be entered manually.
Target Attendance	Represents the target attendance for this OCC Code, for a team or department.  You can enter any required text data in this field, manually.

Column Name	Column Description
Target Absence	Represents the target absence for this OCC Code, for a team or department. Actual absents will be evaluated against this target absence, in output section.  You can enter required text/numeric data in this field, manually. This is an optional field
<< Back to home page	Click to go back to home page from any report

Output sheets

As mentioned above, the output section deals with report generation and data export to external files. Each of the functionality is discussed below.

Generating reports

This page displays the list of all reports, generated by tool. At this page, you will be able to view three types of reports namely:

- Statistical Reports
- Graphical reports
- Export Reports.

Each of the above enlisted report categories has a special purpose having different reports within. Details' regarding these reports and more is what this section will brief you with.

1. Click **Show reports** from figure 2.1 (numbered 3).

Following page displays.



Fig 2.4 Show Reports – Main Page

- To view each report, click **Show Report** button in front of that report name.

Let's discuss each report one by one.



Clicking **Show Report** will only display the reports, without refreshing it. To see updated/recent reports, refresh and regenerate it first (see section "Refreshing/Regenerating Reports").

Statistical reports

Statistical reports represent the current workforce supply statistics and forecast its future implication to an organisation.

1. Competency report

This report shows the total number of staff possessing a particular competency based on KSF dimension, and its corresponding level.

Here the data under 'Total Staff' in each row represents the number of staff possessing a particular KSF Dimension at a particular KSF level e.g. First row of report (highlighted in figure 2.5) shows that there is only one staff having level 4 of KSF's Assessment and Treatment Planning dimension.

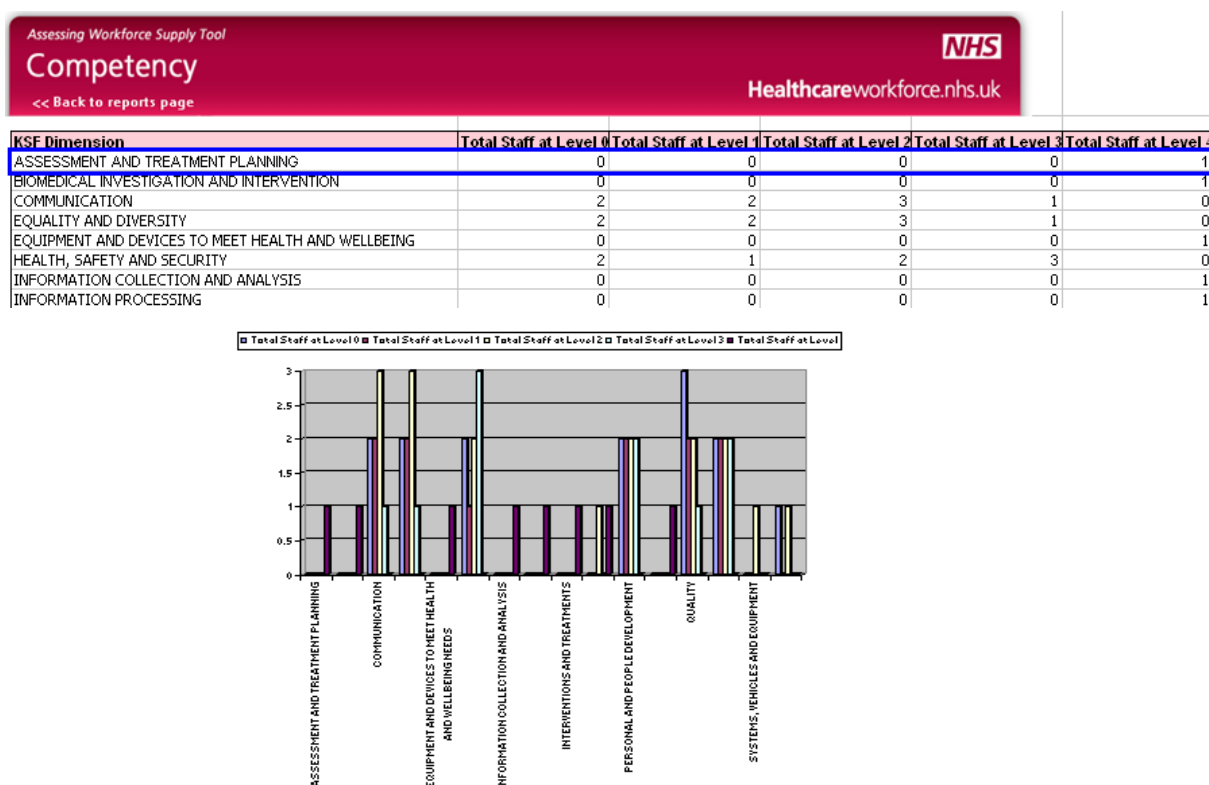


Fig 2.5 Competency Report

2. FTE Establishment report

This report shows the total number of staff belonging to this particular hierarchy (group). The Directorate represents highest level of hierarchy, while moving left-to-right within columns.

Each row represents the total number of employees working in this particular group. For example, the highlighted row represents that a total of 1 employee is working in group bearing OCC Code QA004, as member of Clinical team, within department Clinical Governance, under Clinical Governance directorate.

Assessing Workforce Supply Tool					
FTE Establishment					NHS
<< Back to reports page					
Healthcareworkforce.nhs.uk					
Directorate	Department	Team	OCC Code	OCC Code Description	Total FTE
Cardiac	Stemery	Clinical	AF001	Description AF001	2
Clinical Governance	Clinical Governance	Clinical	QA004	Description QA004	1
Facilities	Education & Development	HR	QA004	Description QA004	1
Finance	Bank	Financial	HR002	Description HR002	1
Human Resources	Occupational Health	HR	HR003	Description HR003	1

Fig 2.6 FTE Establishment Report

3. Leaver analysis report

This report shows the total number of staff that has left the organisation.

Turnover percentage is calculated on basis of 'total number of leavers' and the 'number of total users of trust'.

Assessing Workforce Supply Tool							
Leaver Analysis							NHS
<< Back to reports page							
Healthcareworkforce.nhs.uk							
Directorate	Department	OCC Co	OCC Description	Pay Band	Termination Dt	Destination Trust	Turnover Percentage
Airedale NHS Trust	Bassetlaw PCT	007	Cardiology	03	12/12/2004	Gwynedd Local Health Board	64.002
Blackpool PCT	GD	001	General (Internal)	03	10/10/2004	North East Lincolnshire PCT	
Blackpool PCT	GD	001	General (Internal)	07	10/10/2004	Bolton Hospitals NHS Trust	
Blackpool PCT	GD	001	General (Internal)	8b	10/10/2004	Heart of Birmingham Primary Care Trust	
Blackpool PCT	GD	001	General (Internal)	8d	10/10/2004	Bolton Hospitals NHS Trust	
Blackpool PCT	GD	011	Geriatric Medicine	03	10/10/2004	King's College Hospital Foundation NHS Trust	
Blackpool PCT	GD	012	Medical Oncology	03	10/10/2004	South of Tyne and Wearside Mental Health NHS	
Blackpool PCT	GD	014	Clinical Neurophysiology	03	10/10/2004	Yale of Glamorgan Local Health Board	
Blackpool PCT	GD	015	Renal Medicine	03	10/10/2004	Heart of Birmingham Primary Care Trust	
Blackpool PCT	GD	015	Renal Medicine	03	10/10/2004	Northumberland, Tyne & Wear NHS Trust	
Blackpool PCT	GD	015	Renal Medicine	8d	10/10/2004	Merthyr Tydfil LHB	
Blackpool PCT	GD	015	Renal Medicine	03	10/10/2004	Bolton Hospitals NHS Trust	
Blackpool PCT	GD	015	Renal Medicine	03	10/10/2004	South of Tyne and Wearside Mental Health NHS	
Development	Programing	003	Infectious Diseases	05	15/12/2007	Great Yarmouth	
L1 Ceredigion & Mid Wales NHS	Royal National Hospital for Rheumatic Diseases NHS	006	Neurology	04	12/12/2004	Trafford Healthcare NHS Trust	
Pembrokeshire LHB	Programing	005	Dermatology	06	15/12/2004	North West Anglia	

Fig 2.7 Leaver Analysis Report

4. Absence analysis report

This report shows the total number of staff, categorised on basis of Directorate or Department, who are absent.

'Number of Episodes of Absence' means the total number of absents made so far and 'number of absent staff' means the total number of staff who have made these absents (ie. sum of all staff having 1 or more absents). Here, the report viewers can compare total number of absents against the 'target absent values', for analysis purpose.

Assessing Workforce Supply Tool							
Absence Analysis							NHS
<< Back to reports page							
Healthcareworkforce.nhs.uk							
Directorate	Department	OCC Co	OCC Description	Number of Episodes of Abs	Number of Absent St	Total St	Target Absence
Airedale NHS Trust	Bassetlaw PCT	007	Cardiology	1.00	1.00	1	
Blackpool PCT	GD	001	General (Internal)	8.00	5.00	5	25.00
Blackpool PCT	GD	004	Respiratory Medicine	5.00	3.00	4	15.00
Blackpool PCT	GD	005	Dermatology	0.00	0.00	1	23.00
Blackpool PCT	GD	009	Genito-Urinary Medicine	5.00	1.00	1	
Blackpool PCT	GD	011	Geriatric Medicine	1.00	1.00	1	
Blackpool PCT	GD	012	Medical Oncology	1.00	1.00	1	
Blackpool PCT	GD	014	Clinical Neurophysiology	1.00	1.00	1	
Blackpool PCT	GD	015	Renal Medicine	5.00	5.00	5	
Development	Programing	003	Infectious Diseases	1.00	1.00	1	100.00
King's College Hospital Foundation NHS	Development	002	Paediatrics	2.00	1.00	1	45.00
L1 Ceredigion & Mid Wales NHS Trust	Royal National Hospital for Rheumatic Diseases NHS	006	Neurology	4.00	1.00	1	10.00
Pembrokeshire LHB	Programing	005	Dermatology	2.00	1.00	1	23.00
Washington DC	Support	001	General (Internal)	5.00	1.00	1	25.00

Fig 2.8 Absence Analysis Report

5. Sickness analysis report

This report shows the total number of staff by OCC code group, with their sickness percentage.

'Days Lost' means the total number of leaves made so far and 'Headcount' means the total number of staff who have availed these leaves (ie. sum of all staff having 1 or more leaves). 'Total staff' represents the total number of staff within a particular group.

Assessing Workforce Supply Tool					NHS				
Sickness Analysis					Healthcareworkforce.nhs.uk				
<< Back to reports page									
OCC Code	OCC Description	Days Lost	Headcount	TotalStaff					
001	General (Internal) Medicine	56.00	6.00	6					
002	Paediatrics	5.00	1.00	1					
003	Infectious Diseases	32.00	1.00	1					
004	Respiratory Medicine	22.00	4.00	4					
005	Dermatology	41.00	2.00	2					

Fig 2.9 Sickness Analysis Report

6. Retirement forecasting report

This report shows the upcoming retirement forecasting for the total number of staff, categorised on basis of directorates, department etc.

Assessing Workforce Supply Tool				NHS	
Retirement Forecasting				Healthcareworkforce.nhs.uk	
<< Back to reports page					
Directorate	Department	Pay Band	Staff falling between 55 and 65		
Cardiac	Surgery	2	0		
Cardiac	Surgery	4	0		
Clinical Governance	Clinical Governance	9	0		
Facilities	Education & Development	5	0		
Finance	Bank	7	0		
Human Resources	Occupational Health	8a	0		

Fig 2.10 Retirement Forecasting Report

7. Female age group reports

This report shows the pay band wise count of female staff, falling between age group of 25 and 35, categorised on basis of directorates, department etc.

Assessing Workforce Supply Tool					NHS	
Female Age Group					Healthcareworkforce.nhs.uk	
<< Back to reports page						
Directorate	Department	Team	Pay Band	Female Staff falling between 25 and 35		
Cardiac	Surgery	Clinical	2	0		
Cardiac	Surgery	Clinical	4	0		
Clinical Governance	Clinical Governance	Clinical	9	0		
Facilities	Education & Development	HR	5	0		
Finance	Bank	Financial	7	0		
Human Resources	Occupational Health	HR	8a	0		

Fig 2.11 Female Age group Report

8. Number of staff contract wise

This report shows the number of staff on the basis of their contract types.

'Total Staff' represents the number of employees belonging to a specific 'Contract Type'.

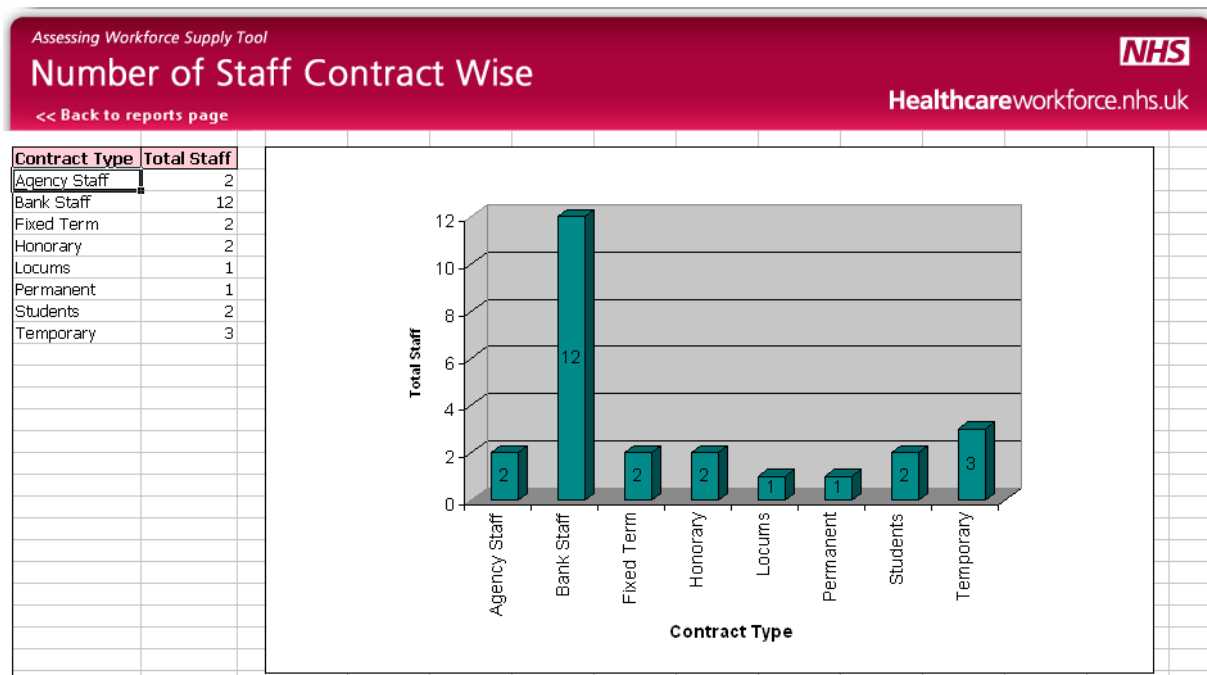


Fig 2.12 Number of Staff- Contract Wise Report

9. Staff recruitment source report

This report shows the total number of staff being recruited from a particular source.

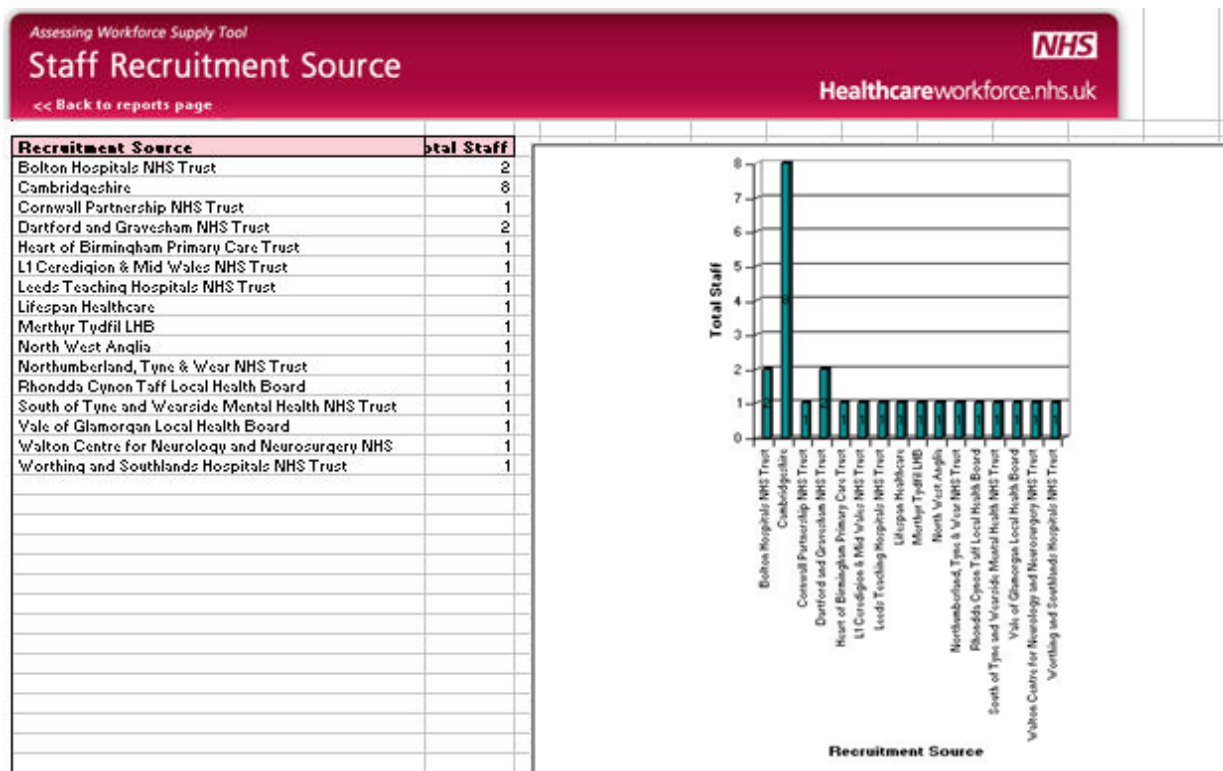


Fig 2.13 Staff Recruitment Source Report

10. Leaver's destination report

This report shows the total number of staff leaving for a particular destination.

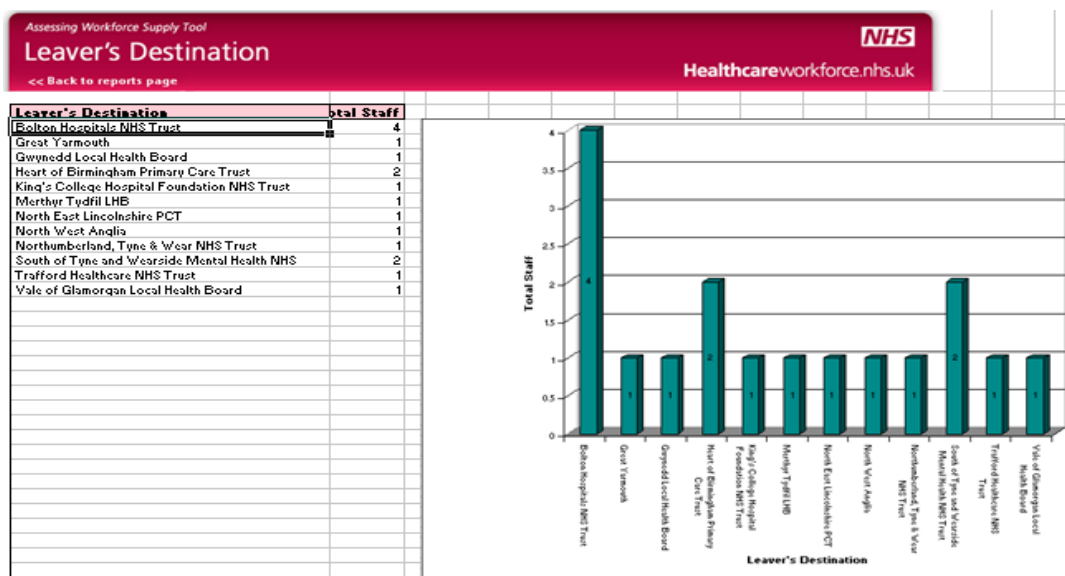


Fig 2.14 Leaver's Destination Report

11. Staff age group report

This report shows the total number of staff, who belong to a particular age group.

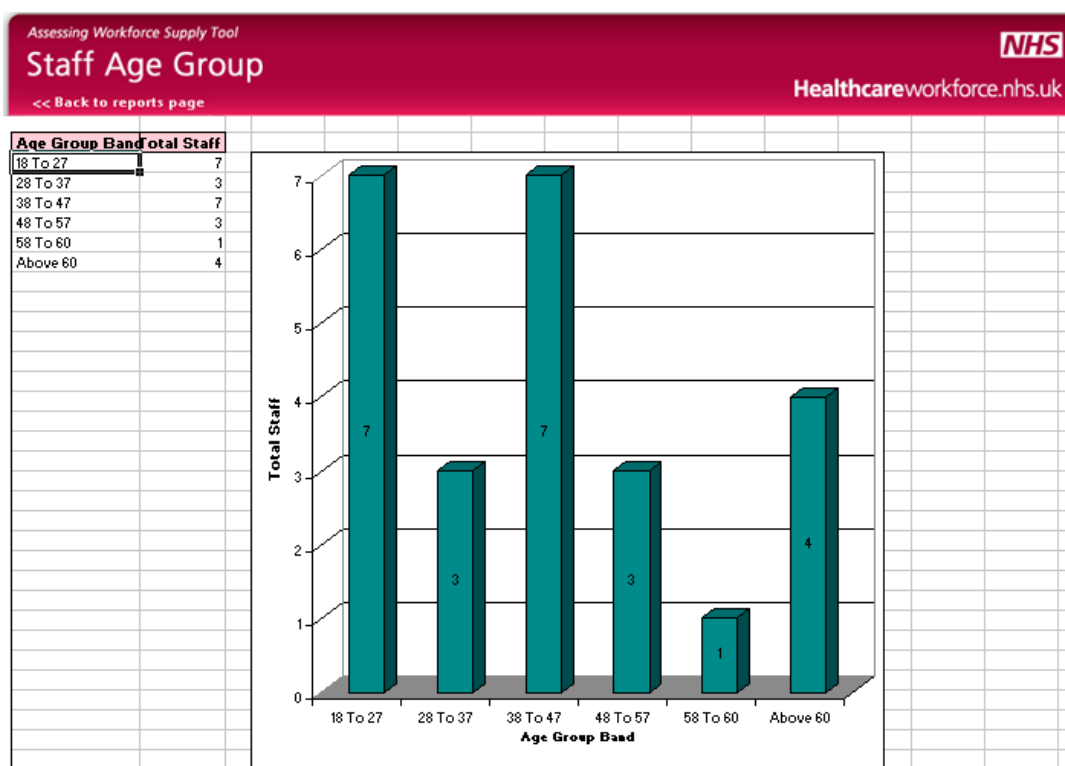


Fig 2.15 Staff Age Group Report



All the information in these reports comes from the two input sheets and calculated automatically by the tool while generating report.



To go back to Show Reports page from any report, click [<< Back to reports page](#) link, provided on top left corner of all reports.

Graphical reports

The Workforce Supply Assessment Tool provides you with an option to view the reports in graphical format.

- To view each report, click **Show Graph** button in front of that report name. Let's discuss each report one by one.



The description of each of these reports can be seen in **"Statistical Reports"** section in this chapter.

1. Leaver Analysis Report

The report displays as follows.

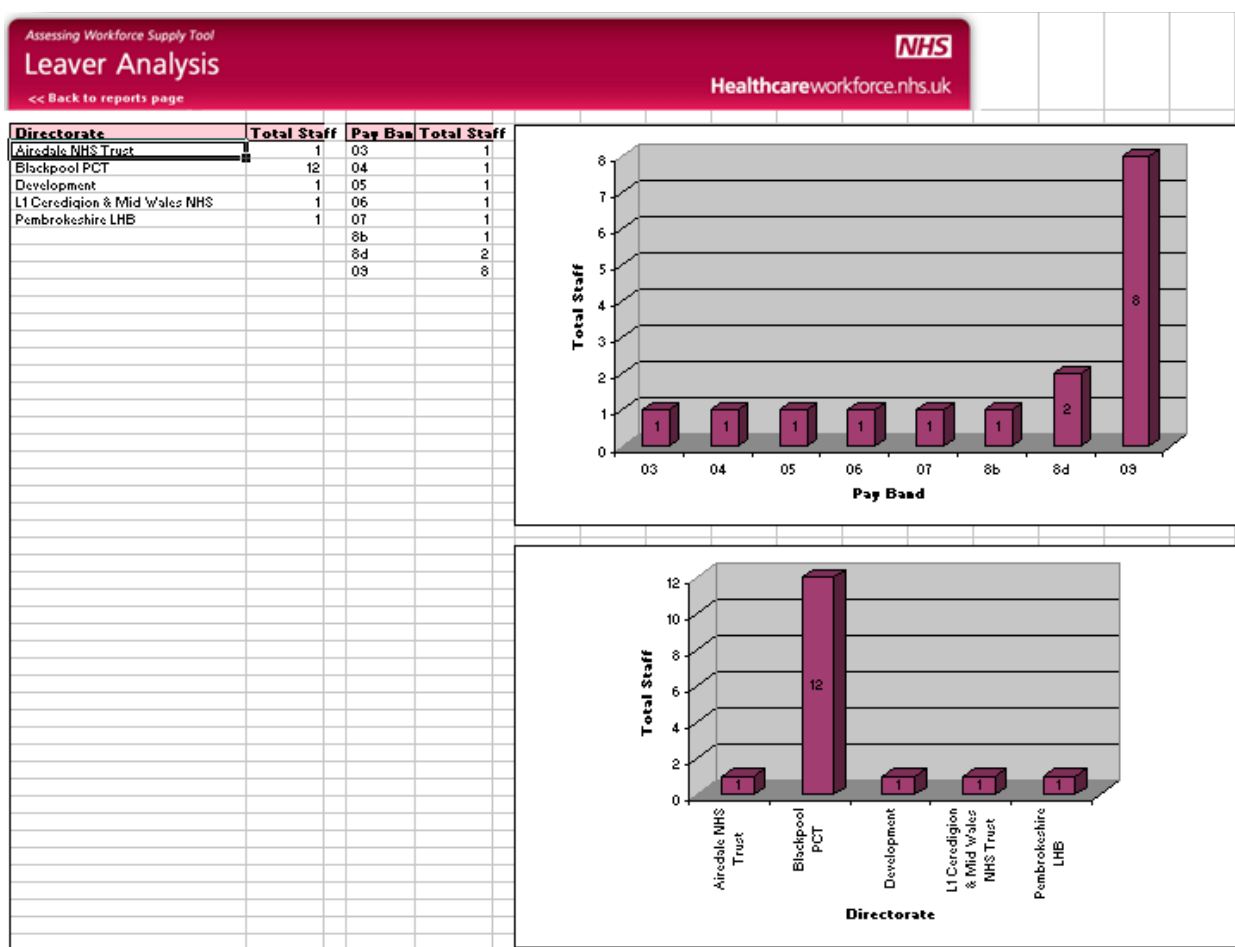


Fig 2.16 Leaver Analysis Report

The graphs show the total staff leaving the organisation, w.r.t 'directorate' and 'pay band'. X-axis represents the respective pay band or directorate; whereas the Y- axis represents the total number of staff.

2. Absence analysis report

The report displays as follows.

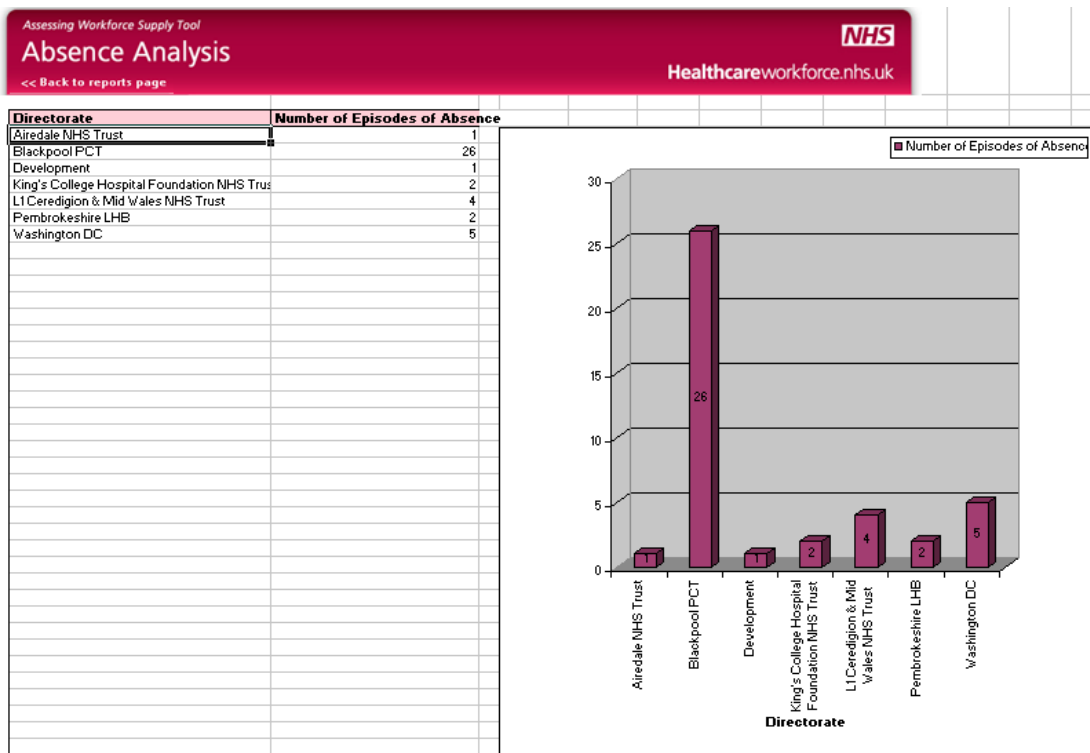


Fig 2.17 Absence Analysis Report

The graph shows the 'Number of Episodes of Absence' w.r.t 'directorate'. X-axis represents the directorate; whereas the Y- axis represents the total number of absences.

3. Sickness analysis report

The report displays as follows.

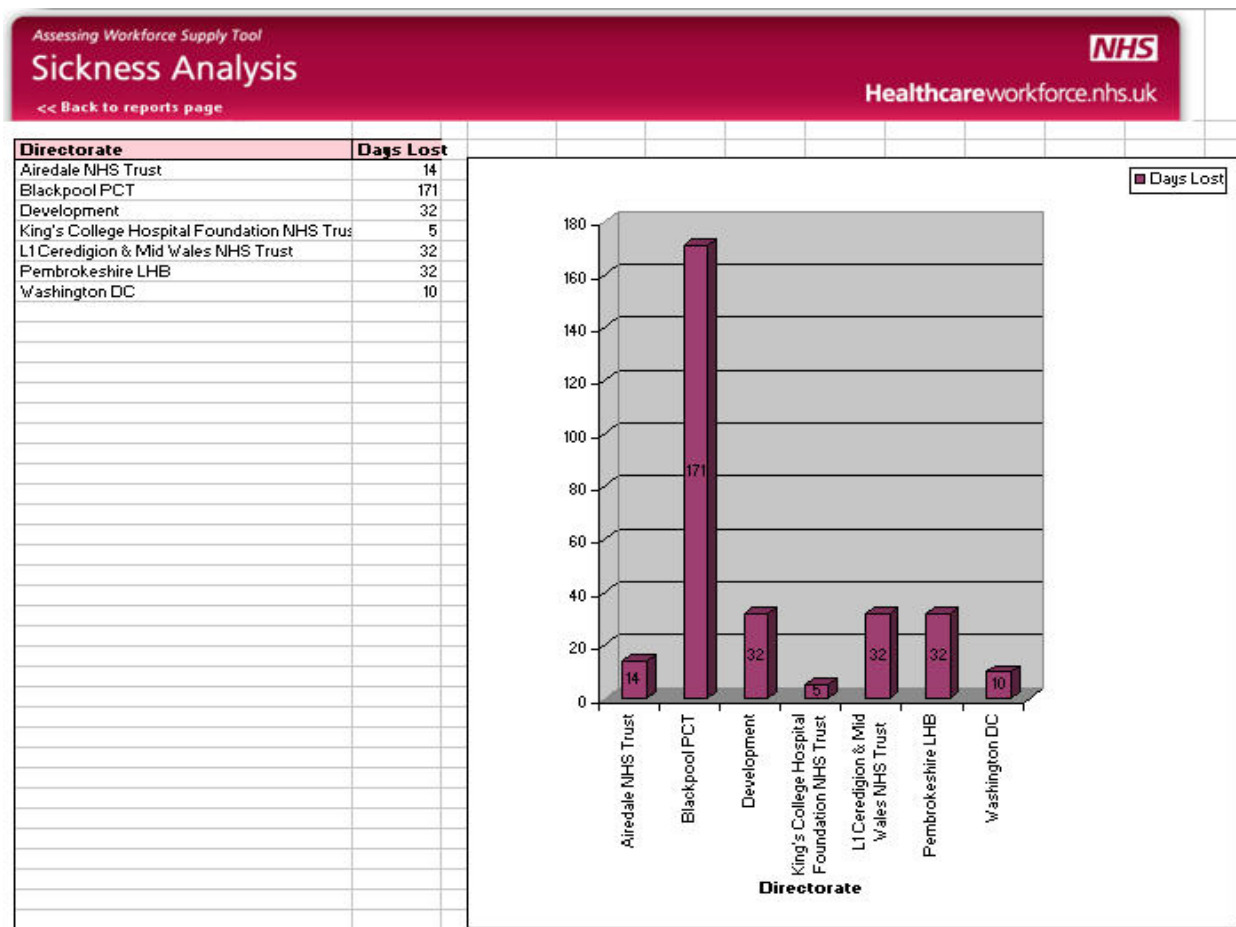


Fig 2.18 Sickness Analysis Report

The graph shows the number of 'Days Lost' w.r.t 'directorate'. X-axis represents the directorate; whereas the Y- axis represents the number of days lost.

4. Retirement forecasting report

The report displays as follows.

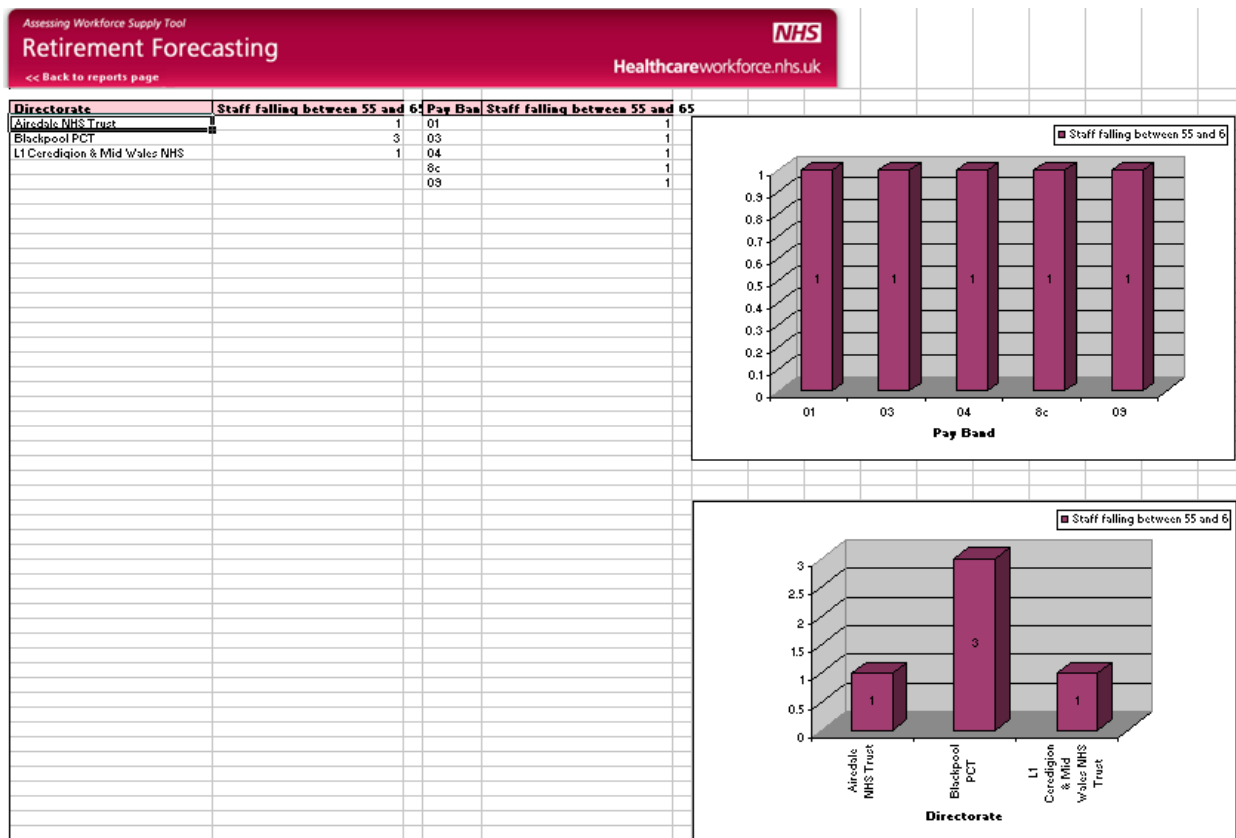


Fig 2.19 Retirement Forecasting Report

The graphs show the total staff falling between age 55 and 65, w.r.t 'directorate' and 'pay band'. X-axis represents the respective pay band or directorate; whereas the Y-axis represents the total number of staff falling between this age group.

5. Female age group report

The report displays as follows.

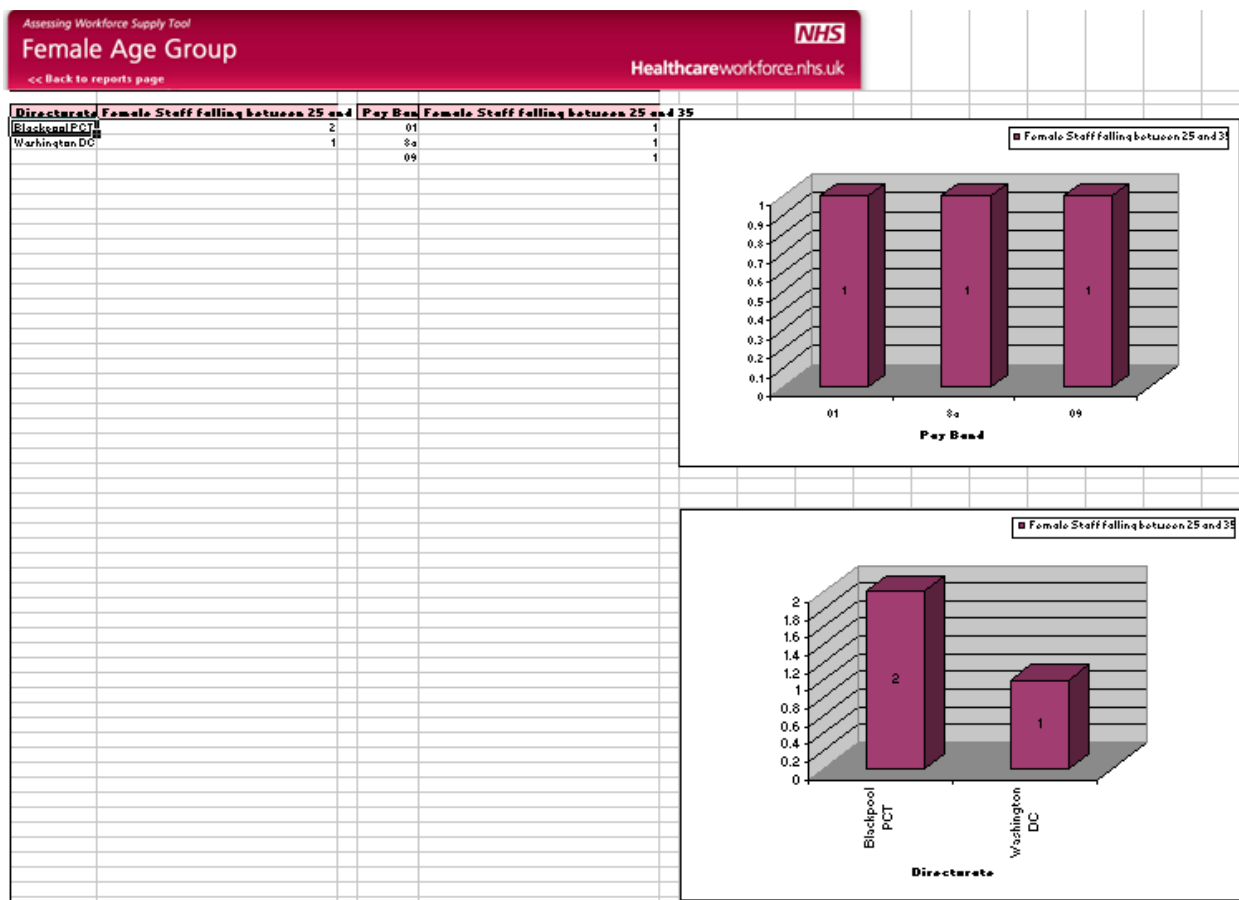


Fig 2.20 Female Age Group Report

The graphs show the total female staff falling between age 25 and 35, w.r.t directorate as well as w.r.t. pay band. X-axis represents the respective pay band or directorate; whereas the Y-axis represents the total number of female staff falling between this age group

Export reports

The Workforce Supply Assessment Tool provides you with an option to export all these reports (or any of these, as required) to a new/blank Excel workbook.

1. Click **Export Reports** to export a report to new work book sheet from figure 2.4 'Show Reports-Main Page'.

Following pop-up displays.

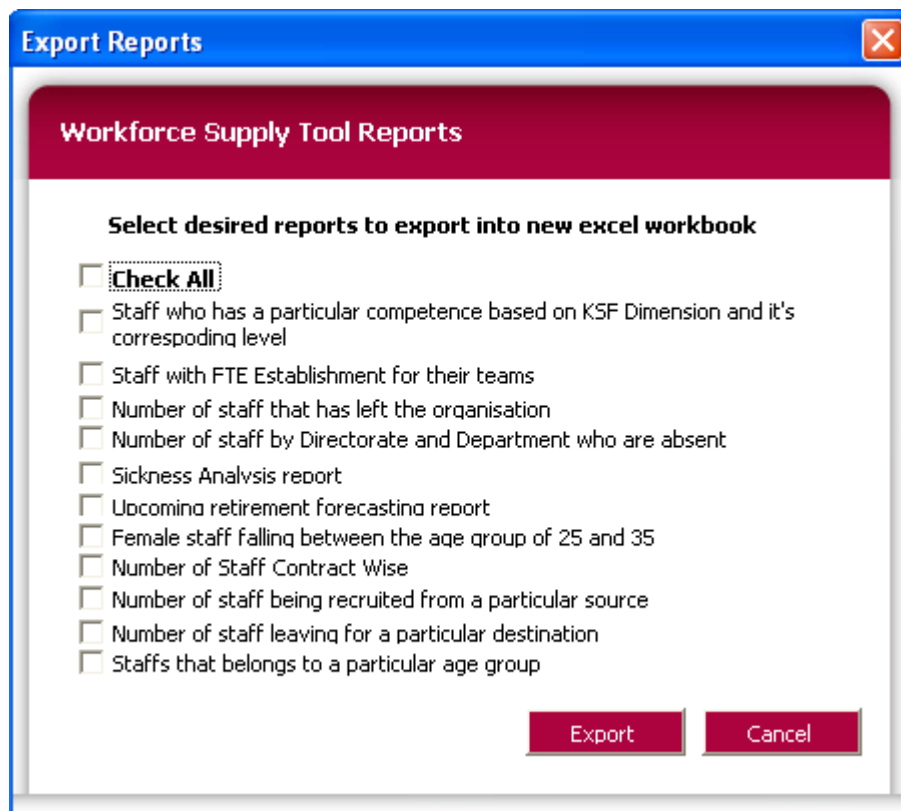


Fig 2.21 Export reports Pop-Up

From this page, you can select the report(s) you want to export to new Excel Sheet. You can select the reports by clicking the checkboxes with that particular report name. Once you select the reports and click **Export**, you will be asked to give the path where you want to save this new sheet. Doing this will export the report(s) to a new Excel workbook, with the specified name and at specified location.

Refreshing / regenerating reports

The Workforce Supply Assessment Tool allows you to refresh or regenerate the reports at any time.



The reports will only be refreshed and won't be displayed. To view these reports, you will have to follow the same procedure as described in section **"Generating Reports"**.



Regenerate/Refresh Reports

1. Click from figure 2.4, to refresh or regenerate the reports at any time.

Following pop-up displays.

Regenerate/Refresh Reports

Workforce Supply Tool Reports

Select desired report(s) to refresh/regenerate

- ☐ **Check All**
- ☐ Staff who has a particular competence based on KSF Dimension and it's corresponding level
- ☐ Staff with FTE Establishment for their teams
- ☐ Number of staff that has left the organisation
- ☐ Number of staff by Directorate and Department who are absent
- ☐ Sickness Analysis report
- ☐ Upcoming retirement forecasting report
- ☐ Female staff falling between the age group of 25 and 35
- ☐ Number of Staff Contract Wise
- ☐ Number of staff being recruited from a particular source
- ☐ Number of staff leaving for a particular destination
- ☐ Staffs that belongs to a particular age group

Refresh **Cancel**

Fig 2.22 Refresh reports pop-up

From this page, you can select the report(s) you want to refresh or regenerate. You can select the reports by clicking the checkboxes with that particular report name. Once you select the reports and click **Refresh**. Doing this will refresh the selected report(s) ie. the previous ones will be replaced with the updated/recent versions of reports.

Password protecting the exported file and sheets

You can protect your Excel files/sheets with a password, after exporting these to a new Excel Workbook.

To protect the files follow these steps:

1. Under **Tools** tab, click **Options** link.

Following screen displays.

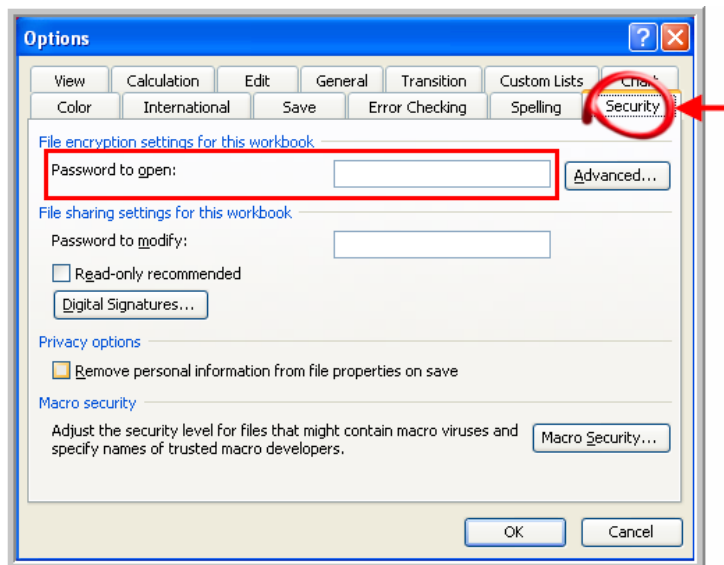


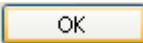
Fig 2.22: Password Protection-File

2. Select Security tab from the screen in fig 2.22.
3. Enter password in field titled "Password to Open" (highlighted in fig 2.22).

Following screen displays



Fig 2.23: Confirm Password

4. Enter the same password in screen shown in fig 2.23
5. Click 



Once you password protect the file, the file cannot be opened without entering correct password..

To protect the sheets, follow these steps:

1. Go to **Tools** menu in task bar.
2. Select **Protection** from this menu.
3. Select **Protect Sheet** from sub-menu.

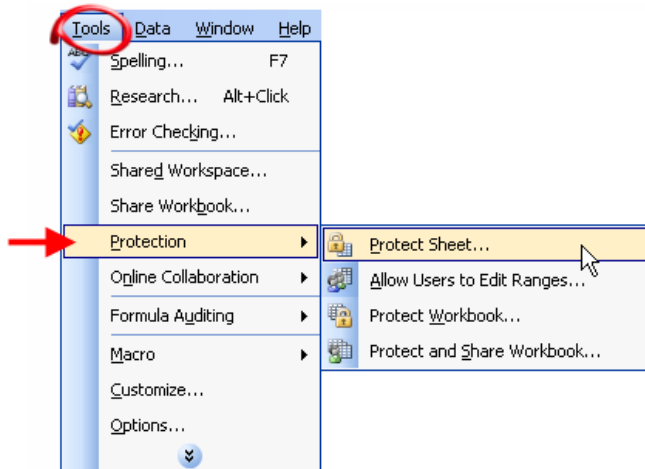


Fig 2.24: Password Protection-Sheet

Following screen displays.

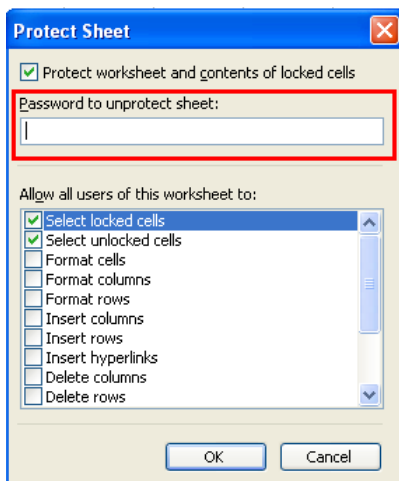
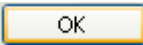


Fig 2.25: Protect Sheet

4. Enter password in field titled "Password to Unprotect Sheet" (highlighted in fig 2.25). Confirm Password screen displays (see fig 2.23).
5. Enter the same password in screen shown in fig 2.23
6. Click .

Managing front page contents

NWP Supply Tool provides you with the functionality to change front page contents, as you desire.



You should be authorised to change the contents. You can't use this feature without having an administrator password.

1. Click **Manage frontpage contents** from figure 2.1 (numbered 4).

Following pop-up displays.

The dialog box is titled 'Administrator Password' and has a red header bar with the text 'Administrator Login'. Below the header, there is a text input field labeled 'Enter Password'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Fig 2.26 Administrator Password Pop-up

2. Enter the password provided to you by the supplier.

Following pop-up displays.

The dialog box is titled 'Front Page Text' and has a red header bar with the text 'Add/Modify Contents'. Below the header, there is a text area labeled 'Front Page Text' containing the following text: 'The tool can also be used to assess current workforce supply statistics and forecast their future implication to an organisation. Notes on how to use this tool can be found here (insert link to any instructions). All queries about this tool should be addressed to communications@nwprhs.org.uk'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Fig 2.27 Modify front Page Contents Pop-up

3. Click **OK** to save changes.
4. Click **Cancel** to go back to front page without changing contents.

Appendix A

Glossary

Export data – To take data from one file to another, by copying it to the target file.

Front page – First/main page that is displayed when you start this Workforce Supply Assessment Tool (see figure 2.1)

FTE - Full Time Equivalent

Input data– To enter data in some file etc.

OCC code – National Occupational Code

Customer support

Ikonami Ltd offers a Helpdesk service for its customers.

The Helpdesk will give you help for the use of the system and will answer all questions you might have while using NWP Supply Assessment Tool.

The Helpdesk can be contacted via email.

E-mail: support@ikonami.net



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